Publication 1436 Change Page for 1040/4868 MeF scenarios

The Publication 1436 combines the current e-File system test scenarios and the Modernized e-File (MeF) test scenarios. The changes below for scenarios 1, 2 and 3 apply to both the current e-File system and MeF. Test Scenario 5 changes apply to the MeF scenario only.

01/31/2010 Revision

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Item #		Publication	Change	Date		
		1436 Page #	5 4000 B 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Changed		
1	1	55	Form 1099-R - change recipient's zip code to 94102	10/29/2009		
2	1	52	Add Other Withholding Statement:	1/31/2010		
			WITH HOLDING CODE WITHHOLDING AMOUNT			
			WITHHOLDING CODE WITHHOLDING AMOUNT			
	-	00	FORM 1099 20000	40/00/0000		
3	3	63	Preparer's City changed to Buffalo	10/29/2009		
5	3	71	Preparer's City changed to Buffalo	10/29/2009		
5	3	72	Form W-2 Box 3 - changed to 106,800	10/29/2009		
			Schedule A - Line 10 changed to 3200			
6	3	73	Line 13 changed to blank or zero	10/29/2009		
	3	74	SELLER FINANCED INTEREST 700			
			300 SCH B TEST ADDRESS			
			NY, NY 10007			
			400-00-1111			
			700			
			INTEREST PAYER 1 1300 (changed from			
			300)			
			INTEREST PAYER 2 1000			
			NOMINEE PAYER 1 500			
			NOMINEE PAYER 2 500			
			INTEREST SUBTOTAL 4000			
7			NOMINEE DISTRIBUTION 1000	10/29/2009		
8	3	76	Form 2106 Part II Line 11 - change date to 02/17/2009	10/29/2009		
			Change City to Grubville for all addresses with Zip code			
9	5	various	63041	10/29/2009		
10	5	n/a	Form 1099-R missing in scenario - it is attached to this file	10/29/2009		
11	5	96	Schedule A Line 29 - "No" box should be checked	10/29/2009		
			Sch C - Stan Blue - Part I change to			
			Line 1 530000			
			Line 2 10000			
			Line 3 520000			
			Line 4 30000			
12	5	97	Line 5 490000	10/29/2009		
13	5	110	Form 4562 - Line 20c(c) changed from 100,000 to 104,350	11/6/2009		
14	5	88	Award amount changed to 1150	11/6/2009		
			Form W-2 (Sandy Blue) Line 17 changed to 500 & 200			
15	5	91	Line 19 chanegd to 500 & 600	11/6/2009		
	5	96	Schedule A Line 5 changed to 3000	11/6/2009		
			Line 6 changed to 1500			
			Line 9 changed to 4500			
			Line 10 changed to 1500			
16			Line 15 changed to 1500			

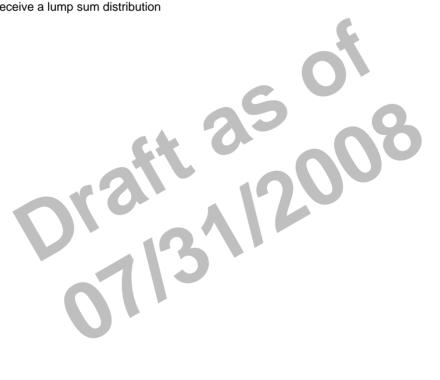
17	5	93	Line 33 should be blank in the Publication (73 is not correct)	11/20/2009
18	5	105 & 106	Form 2441 Line 1 and Line 18: change to 3300	11/20/2009

Note: In 1040 MeF test scenario 5, TP elects to apply withholding to quarters actually worked

		CII	ED (IT CNECKE	a)							
PAYER'S name, street address, city, state, and ZIP code XYZ Company 15 Oak Street Sacramento, CA 94203			Gross distributi 20 Taxable amoun	0000	OND NO. 1343-0119			_	nsio	ibutions From ons, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.	
			Taxable amoun			To		n 🔳	Copy B Report this		
PAYER'S federal identification number	RECIPIENT'S identification number	3	Capital gain (in in box 2a)	cluded	4	Federal withhel					
69-0000010 400-00-1035					\$				fe	return. If this form shows ederal income	
RECIPIENT'S name STAN BLUE			Employee contri /Designated Rot contributions or insurance premi	:h	6	Net unr appreci employ	ation in	1	tax withheld in box 4, attach this copy to your return.		
Street address (including apt. no	p.)	7	Diotribution	IRA/ SEP/	\$ 8	Other					
4000 5th Test St Apt 6			code(s)	SIMPLE	\$			%		This information is being furnished to the Internal	
City, state, and ZIP code Grubville, MO 63041			Your percentage distribution	of total 80 %	9b \$	Total emp	,	ntributions 10000	Revenue Service.		
	1st year of desig. Roth contrib.	1 .	State tax withhe		11	State/Page 1	ayer's s	state no.	12	State distribution	
		\$		500		MN KS		000007	\$	5000 5000	
Account number (see instructions)		+ +	Local tax withhe	300 ald	14	Name o		000006	,	Local distribution	
`			Looa, tax within	250	'	TAGING C		cality 1	\$	5000	
123456				150				cality 2	\$	5000	

Note: Taxpayer did not receive a lump sum distribution

Form 1099-R



Department of the Treasury - Internal Revenue Service